

QUARTERLY and FINAL REPORTS

Program Specific Deliverables for Third Party Programs

(NOTE: The Energy Division will send to all Program Implementers separate Quarterly Reporting instructions and a Quarterly Report Narrative template. The following is a list of the data that will be required in the Quarterly Reports and Final Report in addition to or consistent with what was required in the Program Implementation Plan Workbook and Narrative.)

Direct Installation Programs (Programs where Implementer provides energy efficiency measures, including maintenance, repair, or optimization services at no charge to the Customer)

1. Using the workbook provided to complete the Program Implementation Plan, implementer shall record and report the following **aggregated** data by quarter.
 - Energy efficiency measures installed (list each type)
 - Quantity of each type of energy efficiency measure installed
 - Estimated energy and demand savings per measure (kW, kWh, Therms)
2. In the report narrative implementer shall report **Aggregated** Customer details related to specific program goals (as applicable) (Report total achieved by end of reporting period)
 - Customer's language preference – *if proposal targets non-English speakers*
 - Structural category such as age and type of building – *if proposal specifies certain types of building to be targeted*
 - Customer size, such as Small or Very Small businesses – *if proposal specifies size of Customer to be targeted*
 - Whether Customer falls into moderate income level (income level less than 400% of federal poverty guidelines) – *if proposal specifies income target*
 - Housing Type - Mobile home – *if proposal targets Multi-Family and Mobile Home Tenants*
 - Whether Customer is located in areas other than the San Francisco Bay Area, San Diego area, Los Angeles Basin or Sacramento – *if proposal targets rural customers*
 - If Customer is a business with less than ten employees – *if proposal targets small businesses*
 - If Customer is a Small (annual electric demand is between 20 kW and 100 kW, or whose annual gas consumption is between 10,000 therms and 50,000 therms, or both) or Very Small (annual electric demand is less than 20 kW, or whose annual gas consumption is less than 10,000 therms, or both) non-residential customer– *if proposal targets small businesses*
 - If Customer is a business in a leased space – *if proposal targets businesses in leased spaces*
 - *Any other Customer characteristics that proposal specifically targets*

Rebate, Loan, or other Financial Assistance Programs (Programs where Implementer provides rebate, loan, co-funding, or other financial assistance for the installation of energy efficiency measures, including maintenance, repair, or optimization services)

1. Using the workbook provided to complete the Program Implementation Plan, Implementer shall record and report the following **aggregated** data by quarter.
 - Energy efficiency measures installed (list each type)
 - Quantity of each type of energy efficiency measure installed
 - Estimated energy and demand savings per measure (kW, kWh, Therms)
2. In the report narrative Implementer shall report **Aggregated** Customer details related to specific program goals (as applicable) (Report total achieved by end of reporting period)
 - Customer's language preference – *if proposal targets non-English speakers*
 - Structural category such as age and type of building – *if proposal specifies certain types of building to be targeted*
 - Customer size, such as Small or Very Small businesses – *if proposal specifies size of Customer to be targeted*
 - Whether Customer falls into moderate income level (income level less than 400% of federal poverty guidelines) – *if proposal specifies income target*
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 - If Customer is a business in a leased space – *if proposal targets businesses in leased spaces*
 - *Any other Customer characteristics that proposal specifically targets*
3. For rebate applications received by Implementer and not yet paid (i.e. Commitments), Implementer shall provide the following **aggregated** data using the workbook provided to complete the Program Implementation Plan:
 - Number of applications received
 - Estimated amount of incentives to be paid
 - Estimated demand and energy savings as applicable (kW, kWh, therm)
4. On a quarterly basis, Implementer shall report on the average rebate processing turn-around time.

Training

For all training session completed during reporting period, Implementer shall submit the following information:

- Brief description of each training (subject matter, delivery method, material provide to attendees, etc.).
- Number of attendees for each training session.

Marketing

For all marketing materials developed, Implementer shall submit the following deliverables during each reporting period:

- Brief description of marketing materials, including but not limited to flyers, brochures, posters, program announcements, newsletters, website posting, websites, point-of-purchase materials, etc.
- Quantity produced
- Method(s) of distribution and approximate quantities distributed by each method

Audits/Site Surveys

For all audits and site surveys conducted, Implementer shall submit the following **aggregated** data:

- Number of Audits completed
- Energy-using equipment and features analyzed
- Energy efficiency measures recommended
- Estimated demand and energy savings potential
- Energy savings claimed for all audits – *If energy savings are claimed and supported by a signed customer agreement to install or implement the recommended energy efficiency measures, or report describing Implementer's follow-up to verify that customer has taken action* (Signed Customer agreements and verification reports need only be submitted with Monthly Reports, not with Quarterly Reports)